

DIRECTIVE

WORKFORCE INVESTMENT ACT

Number: WIAD03-11

Date: April 13, 2004
69:136:lh:8203

TO: WORKFORCE DEVELOPMENT COMMUNITY

SUBJECT: ORGANIZATIONAL INFORMATION CHANGES

EXECUTIVE SUMMARY:

Purpose:

This directive provides guidance to Local Workforce Investment Areas (LWIA) and all other subgrantees of Workforce Investment Act (WIA) funds that make a change to their organizational information.

Scope:

This directive requires LWIAs or any subgrantee of WIA funds to provide documentation for organizational changes to a central point of contact within the Workforce Investment Division (WID).

Effective Date:

This directive is effective immediately.

REFERENCES:

None

STATE-IMPOSED REQUIREMENTS:

This directive contains some State-imposed requirements that are shown in ***bold, italic*** type. State instructions provide the process for submittal of all organizational changes.

FILING INSTRUCTIONS:

This directive finalizes WIA Draft Directive WIADD-69, issued for comment on March 2, 2004. Retain this directive until further notice.

BACKGROUND:

The subgrant is the vehicle by which the State provides funding to LWIAs and subgrantees. In turn, the LWIAs and subgrantees are responsible for ensuring the

State has the most current information for each of their organizations. Having the most current information enables the State to execute contracts, disseminate information and disburse funds with the least amount of delay. In the past, the Employment Development Department (EDD) has received requests to update or change organizational information in a variety of ways, which has created problems. To eliminate those problems, we are establishing a single point of contact within WID who will be responsible for the review and processing of any organizational change submitted by a LWIA or subgrantee.

POLICY AND PROCEDURES:

All LWIAs and subgrantees in receipt of WIA funds must submit changes to their organizational information to the WID Financial Management Unit. The following changes must be forwarded on official letterhead stationery and be signed by the appropriate Chief Elected Official, Administrator, or Executive representing the organization.

Type 1 Changes:

- LWIA/Subgrantee name changes.
- LWIA/Subgrantee Administrator, Local Workforce Investment Board representative(s), Chief Elected Official/Executive name change and any changes to office telephone/e-mail/fax numbers for the above parties.
- LWIA/Subgrantee location address changes.
- LWIA/Subgrantee signatory authorization changes.

Type 2 Changes:

Organizational changes for the following will be accepted via e-mail or fax, but only if submitted by one of the parties affected by the change. For example, Jane Smith is no longer the Fiscal Administrator; John Doe is the new Fiscal Administrator. The e-mail or fax would have to be submitted by either Jane Smith or John Doe. Otherwise, the change must be submitted on official letterhead stationery and signed by the appropriate Chief Elected Official, Administrator, or Executive representing the organization.

- Management Information System (MIS) Administrator and/or Alternate (if applicable) name, telephone, e-mail or fax number changes.
- Fiscal Administrator and/or Alternate (if applicable) name, telephone, e-mail or fax number changes.

NOTE:

The attached Subgrantee Information Change Form is optional and may be used to document any organizational changes. However, if you are making a Type 1 change and wish to use this form, it must accompany the official letterhead stationary request. When filling out the form, users should only fill in the areas where changes have occurred. This form is linked as an attachment to this directive. You can submit the

form by e-mail to Martha Overman at moverman@edd.ca.gov or Debra Shepherd at dshepherd@edd.ca.gov. The fax number for the Financial Management Unit is (916) 654-9586. Documents reflecting organizational changes are to be submitted to:

Attn: Contracts Analyst
Financial Management Unit, MIC-69
Workforce Investment Division
Employment Development Department
P.O. Box 826880
Sacramento, CA 94280-0001

WID Publications

Directives, information bulletins, and other workforce information are posted on EDD's Web site. The WID disseminates these documents to the Workforce Development Community through an e-mail subscription service. When new directives, information bulletins, or other workforce information are posted on the Internet, the WID pagemaster e-mails an "E&T New Web Items" notification to the Workforce Development Community. To automatically receive this notification for directives, information bulletins or other workforce information, you will need to subscribe to our subscription service at www.edd.ca.gov/listmain.htm.

To change an e-mail address you must unsubscribe the old address and then subscribe the new address using the above Web site address. To delete an e-mail address, just unsubscribe. This change will only affect the e-mail subscription service that notifies the Workforce Development Community when new directives, information bulletins, and other workforce information are posted on the Internet.

ACTION:

Bring this directive to the attention of appropriate staff.

INQUIRIES

Please direct inquiries regarding this directive to Debra Shepherd at (916) 654-2418 or Martha Overman at (916) 657-2744.

/S/ BOB HERMSMEIER
Chief
Workforce Investment Division

Attachment is available on the Internet:

[Subgrantee Information Change Form](#) (DOC)